COLYAR CONSULTING GROUP, INC.

Texas Unified Nutrition Programs System (TX-UNPS)

# Summer Food Service Program

# User Manual

**Texas Department of Agriculture**

**Food and Nutrition Division**

***For External Users***

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# Document Revision History

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1

# Introduction

*Welcome to the Texas Unified Nutrition Programs System (TX-UNPS) user manual for the Summer Food Service Program module. TX-UNPS is a web-based software solution that provides administrators, state users, and Contracting Entities with efficient and immediate access to applications, claims, and related nutrition program functions.*

## Web Site Benefits and Features

TX-UNPS is a user-friendly web application that allows authorized state agency personnel and Contracting Entities to submit and approve application, claims, and advance requests via the Internet. Key system features include:

- A software system that manages information regarding Contracting Entities, applications, claims, and reports.
- A single integrated database which serves all child nutrition programs.
- The ability to save partially completed forms on-line, allowing the user to complete the process at a later time.
- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.
- A robust security module that streamlines security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.

## User Manual

This user manual is intended for use by authorized state users that administer the Summer Food Service Program. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

- A general explanation of each feature available.

- Screen examples of web site pages and forms.
- Step-by-step instructions for utilizing the web site features.
- Tips and notes to enhance your understanding of the system.

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# Getting Started

*Before you can begin using TX-UNPS administrative modules, you must be assigned a user ID and password by the TX-UNPS Help Desk that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the TX-UNPS web site.*

## Accessing the Web Site

You can access TX-UNPS from any computer connected to the Internet by opening your Internet browser and entering the following URL in the browser's address line: http://txunps.texasagriculture.gov/

The TX-UNPS project page displays. Click the "**Continue to TX-UNPS logon page"** link to log into TX-UNPS.

**TIP:** You can add this URL to your browser's FAVORITES list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

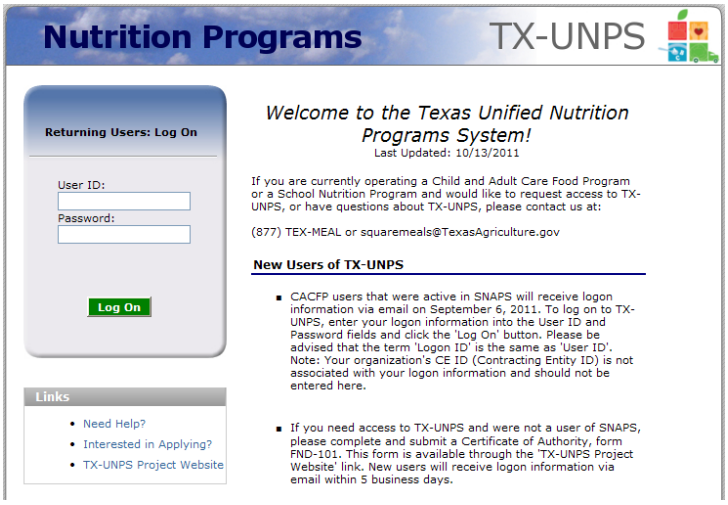

Nutrition Programs
TX-UNPS
Returning Users: Log On
User ID:
Password:
Log On
Links
Need Help?
Interested in Applying?
TX-UNPS Project Website
Welcome to the Texas Unified Nutrition Programs System!
Last Updated: 10/13/2011
If you are currently operating a Child and Adult Care Food Program or a School Nutrition Program and would like to request access to TX-UNPS, or have questions about TX-UNPS, please contact us at:
(877) TEX-MEAL or squaremeals@TexasAgriculture.gov
New Users of TX-UNPS
CACFP users that were active in SNAPS will receive logon information via email on September 6, 2011. To log on to TX-UNPS, enter your logon information into the User ID and Password fields and click the 'Log On' button. Please be advised that the term 'Logon ID' is the same as 'User ID'. Note: Your organization's CE ID (Contracting Entity ID) is not associated with your logon information and should not be entered here.
If you need access to TX-UNPS and were not a user of SNAPS, please complete and submit a Certificate of Authority, form FND-101. This form is available through the 'TX-UNPS Project Website' link. New users will receive logon information via email within 5 business days.

**Figure 1: TX-UNPS Home Page**

## About the TX-UNPS Home Page

The TX-UNPS Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

The bulletin board is managed by TDA and provides general information. It is important to remember that the bulletin board on the home page is viewable by the public.

The log on section is where authorized users enter their User ID and password. It also provides a link for users that have entered a valid User ID, but have forgotten their password, to be transferred to another webpage to reset their password.

The links section provides access to websites and additional information:

- Selecting the **Need Help?** link will transfer the user to a webpage that contains the TX-UNPS User Manuals and other program resources (ex. Administrator's Reference Manual and Handbooks). The user can also send a support request or request a User ID and password.
- Selecting the **Interested in Applying?** link will transfer the user to a webpage that provides additional information on the nutrition programs offered and allow the user to submit a request for an application.
- Selecting the **TX-UNPS Project Website** link will transfer the user to the project's website.

# Logging On

## To log on

1. Access TX-UNPS by typing the URL into the address line of your web browser.
2. Enter your assigned **User ID**.
3. Enter your **Password**.
4. Select **Log On**.

**Note:** If you do not have a User ID and Password, contact the TX-UNPS Help Desk.

**TIP:** The Password is case-sensitive, so be sure to use upper and lower-case letters, if necessary.

## To change your password

If this is your first time logging on, the system will automatically require you to change your password.

1. Select a new password and enter it into the box provided.
2. Re-enter your new password for confirmation.
3. Select **Save** to continue to the TX-UNPS Programs page.

**Note:** Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

# TX-UNPS Content Overview

Once you are logged in and have selected a Contracting Entity, the top portion of the TX-UNPS application contains key elements that provide basic information about your location within the system and the selected Contracting Entity.

**Figure 2: TX-UNPS Content Overview**

| Item | Description |
|---|---|
| **Program Name** | The selected program name appears in the gray area at the top of the page. |
| **Menu Items** | Menu items display on the blue menu bar at the top of the page. Selecting a menu item will take you to its menu page.<br>Users may not have access to all menu items. If you are unable to select a particular menu item, you do not have the necessary security rights. Contact the TX-UNPS Help Desk for assistance. |
| **Navigation/Breadcrumb Trail** | The navigation, or breadcrumb trail, identifies your location within the web site. Selecting a specific portion of the trail will take you back to that particular screen.<br>Note: To ensure that the correct screen and data is displayed, please use the navigation/breadcrumb trail or buttons at the bottom of the screen to navigate throughout TX-UNPS; do not use your browser's Back and Forward button |

| Item | Description |
|---|---|
| **Program Year** | The selected program year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active program year. |
| **Information Box** | The information box displays general information regarding the Contracting Entity/Site. |
| **Log Out** | The logout button displays in the menu bar. It is recommended to select **Log Out** to properly exit the system. |

**Note:** For security reasons, the system will automatically log you out after twenty (20) minutes of inactivity.

## Screen Options

Data entry screens in the system offer the user some or all of the following options: **VIEW, MODIFY, DELETE, and INTERNAL USE ONLY**. The Screen Options area is located on the top right side of the screen, directly beneath the colored bar.

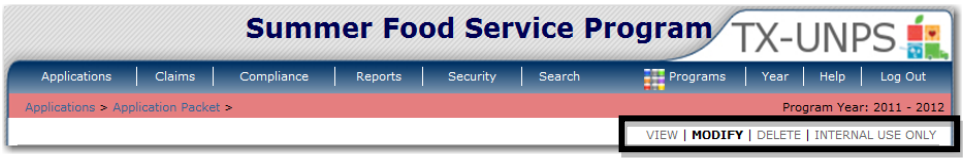



**Figure 3: Screen Options - example**

The following table describes each of the possible screen options:

| Item | Description |
|---|---|
| **VIEW** | Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data. |
| **MODIFY** | Presents the screen in 'modify' mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen. |
| **DELETE** | Deletes the current record displayed on the screen. The user will be presented with a confirmation screen to validate that they intend to delete the record. |
| **INTERNAL USE ONLY** | This option is only available to authorized State users only.<br>This is available for screens that have an Internal Use Only section, which is typically at the bottom portion of the screen. Selecting this option will result in the fields in the Internal Use Only section to become editable. |

# TX-UNPS Programs Page

Once you successfully log on, the TX-UNPS Programs page is displayed. Actual access to specific modules is based on the user's security rights.

**TIP:** The Accounting, Maintenance and Configuration, and Security tiles are always gray because these are administrative modules that are available to only authorized State users. Contracting Entities will not have access to these modules. Only select authorized State users will have access to these modules.

**Figure 4: TX-UNPS Programs Page**

| Selecting this button… | Provides… |
|---|---|
| **School Nutrition Programs** | Access to the School Nutrition Programs home page |
| **Accounting** | Access to the Accounting Module home page |
| **Child and Adult Care Food Program** | Access to the Child and Adult Care Food Program home page |
| **Maintenance and Configuration** | Access to the Maintenance and Configuration module home page |
| **Summer Food Service Program** | Access to the Summer Food Service Program home page |
| **Security** | Access to the Security Module home page |
| **Food Distribution Program** | Access to the Food Distribution Program home page |

**TIP:** To ensure that the correct screen and data is displayed, please use the navigation/breadcrumb trail or buttons at the bottom of the screen to navigate throughout TX-UNPS; **do not** use your browser's Back and Forward button.

# Summer Food Service Program Home Page

The Summer Food Service Program (SFSP) home page contains the message board used by state administrators to post and maintain Summer Food Service Program-related messages. Messages may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SFSP-specific information.

## To access the Summer Food Service Program home page

1. Log on to the TX-UNPS web site.
2. On the Programs screen, select **Summer Food Service Program**.

**Note:** If a user only has access to the Summer Food Service Program module, the Programs screen is not be displayed

3. The Summer Food Service Program home page displays.

**Note:** State administrators maintain the message boards for all TX-UNPS modules. If you would like a message posted on the Summer Food Service Program home page, please contact the TX-UNPS Help Desk. Please note that messages are visible to both internal and external users.

**Figure 5: Summer Food Service Program Home Page**

## Summer Food Service Program menu options

From the Summer Food Service Program home page, you can select a menu item from the blue menu bar at the top of the page. The Summer Food Service Program menu bar contains menu items specific to the Summer Food Service Program. The table below describes the features available for each menu option, which the remainder of this manual will discuss in detail.

Please note: individual users may have varying menu options due to the user's security configuration.

| Menu Item | Menu Features |
|---|---|
| **Applications** | Access to overall application-related items including:<br>▪ Contracting Entity Manager (State users only).<br>▪ Application Packet (inc. Contracting Entity and Site applications as well as supporting submissions).<br>▪ Advance Requests.<br>▪ Download Forms. |
| **Claims** | Access to SFSP claim entry screens and Contracting Entity-specific payment history. |
| **Security** | Access to an individual user's security-related items including:<br>▪ Change Password (authenticated user changing their password). |
| **Search** | Access to the SFSP Contracting Entity Search screen. |

# Error Processing

All information entered and saved on the system is verified to ensure it conforms to data entry guidelines and system rules. The site performs two types of checks on information entered: Input Edits and Business Rule Edits.

## Input Edits

Whenever you save information or proceed to a new screen, the site checks for input errors. These errors may include entry errors such as an invalid data entry (such as entering a 4-digit Zip Code), or a non-logical entry (e.g., entering a greater number of eligible than enrolled children).

If a form contains an input error and the user selects **Save**, the screen either displays the error code and description in red at the top of the page (and the error code is a letter) or displays a message next to the field in error. Input errors must be corrected before you can proceed. The system will not save data entered on a screen that contains an input error. The user must correct the input errors and select **Save** again.

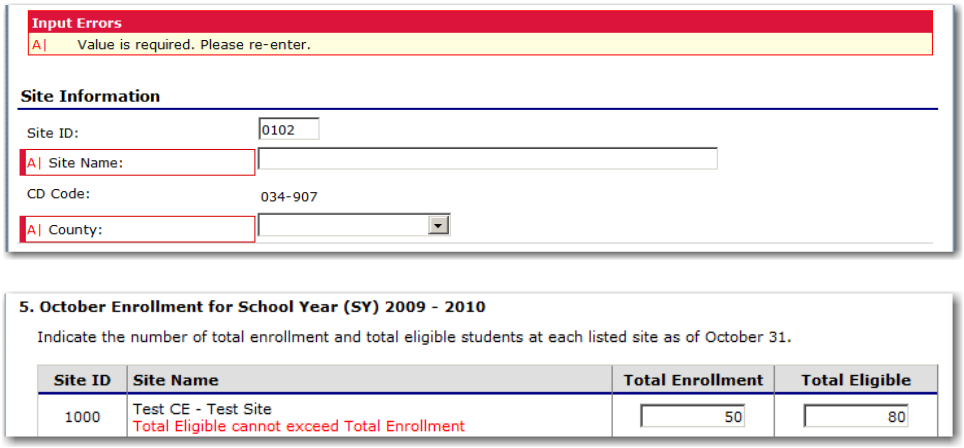



**Figure 6: Examples of an Input Error (Partial Screen)**

## Business Rule Edits

Business rule edits are used to ensure that entered data on a form conforms to state-defined guidelines/requirements and federal regulation. Once the user initiates a save, TX-UNPS will perform business rule edit checks after all input errors have been corrected and display a confirmation screen stating that data entered has been saved and identifies whether errors exist.

The user may correct business rule errors immediately or at another time. The entered data will not be lost. The errors will display at the top of the screen with an error code (usually 4-5 digits) and error description. Business rule edits do not prohibit the system from saving the data entered on the screen.

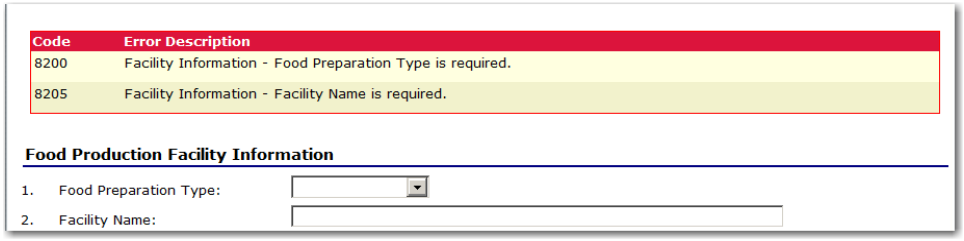



**Figure 7: Example of a Business Rule Error (Partial Screen)**

In addition, business rule edits have an error severity that indicates whether an error is considered an Error or a Warning. Errors appear in red and must be corrected before the form can be submitted. Warnings appear in blue and indicate an "out of the ordinary" data value. Warning errors do not need to be corrected prior to form submission.

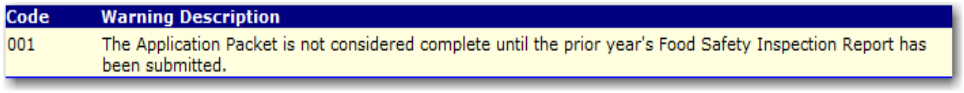

Code
Warning Description
001
The Application Packet is not considered complete until the prior year's Food Safety Inspection Report has been submitted.

**Figure 8: Example of a Warning Error**

**Note:** State administrators maintain the business rule error messages. If you think an error message is incorrect or unclear, please contact the TX-UNPS Help Desk.

# Selecting a Program Year

Information for Contracting Entities and sites is displayed based on the selected program year. Upon logging on to the system, the "active" program year is the default selection and displays in the top-right corner in the blue bar. In order to view information from a prior year, you will need to change the program year.

**Note:** A Contracting Entity will be unable to select a new year if they have not been granted the security right. Contact the TX-UNPS Help Desk and request access to the **Select Year** security right if you think this is in error.

## To select a program year

1. Select **Year** on the blue menu bar at the top of the page. The Year Select screen displays.
2. Select the year.

   **Note:** The selected year is indicated by **<Selected.**
3. Use the menu bar to return to your task in the program.

**TIP:** The ability to view and/or modify a school year is controlled by the State's system administrator. It is important to note that a school year may be set as "view only" to the Contracting Entities and "modify" to authorized State users.

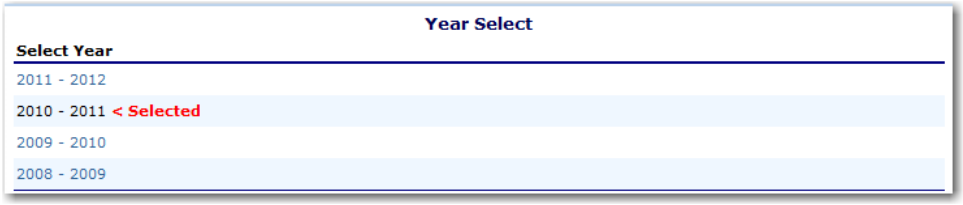



**Figure 9: Year Select screen**

# Contracting Entity Search

**Note:** If you are associated with only one Contracting Entity, you will be unable to access the Contracting Entity Search screen. The system will always default to the Contracting Entity's data.

For most Summer Food Service Program functions, you must search for and select a Contracting Entity using the Contracting Entity Search function before beginning any task. When the Contracting Entity Search screen displays, you can search for the Contracting Entity using all or part of the Contracting Entity's ID, Name, or any other combination of parameters provided on this screen.

## To search for a Contracting Entity

1. On the menu bar, select **Search**. [If the Contracting Entity Search screen is already displayed, begin at Step 2.] The Contracting Entity Search screen displays.
2. Enter search parameters (see table for additional information on using the search parameters).
3. Select **Search.**
4. Select the Contracting Entity you wish to access.

**TIP:** The Contracting Entities List displays based upon the search criteria entered. If no selections were made, the list displays all available Contracting Entities with the designated status (default is "Active"). To display all Contracting Entities, leave all search parameters blank and select **Search.**

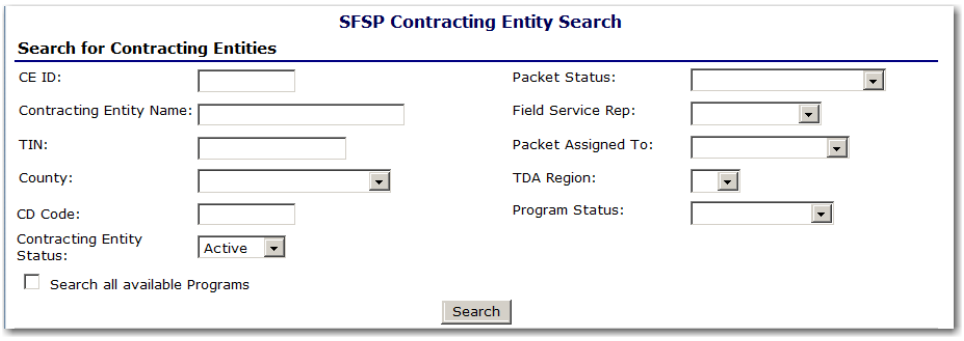



**Figure 10: Contracting Entity Search screen**

Note: Users will only see Contracting Entities associated with their user account.

The search parameters follow a specific set of rules. These are described in the following table.

If the type of search is identified as "includes", the system will search for any Contracting Entity that includes the parameter in any portion of the selected field. For example, if the user entered "386" in the CE ID parameter, the system will retrieve Contracting Entities with CE IDs of "00386" and "01386".

If the type of search is "exact match", the system will search only for any Contracting Entity that exactly matches the parameter. For example, if the user selected "Collin" in the County parameter, the system will retrieve all Contracting Entities associated with the county of Collin.

| Parameter | Type of Search | Search Features |
|---|---|---|
| **CE ID** | "includes" | ▪ If in combination with the Contracting Entity Name, the CE ID takes precedence<br>▪ If in combination with any other parameter, all parameters are used to perform the search |
| **Contracting Entity Name** | "includes" | ▪ If in combination with the CE ID, the CE ID takes precedence; this parameter is ignored<br>▪ If in combination with any other parameter, all parameters are used to perform the search |
| **TIN**<br>**CD Code** | "includes" | ▪ If in combination with the CE ID, the search is performed using both the CE ID and this parameter<br>▪ If in combination with any other parameter, all parameters are used to perform the search |
| **County**<br>**Packet Status**<br>**Field Service Rep**<br>**Packet Assigned To**<br>**TDA Region**<br>**Program Status** | "exact match" | ▪ If in combination with the CE ID, the search is performed using both the CE ID and this parameter<br>▪ If in combination with any other parameter, all parameters are used to perform the search |
| **Contracting Entity Status** | "exact match" | ▪ Required; defaults to "Active"<br>▪ If in combination with any other parameter, all parameters are used to perform the search |

If the "Search all available Programs" checkbox is checked, the results display changes in appearance. The system will ignore all search criteria except for the CE ID and Contracting Entity Status. If the Contracting Name is entered, and no CE ID is entered, the system will ignore all search criteria except for Contracting Entity Name. If no parameters are entered, the system will retrieve all Contracting Entities in all programs.

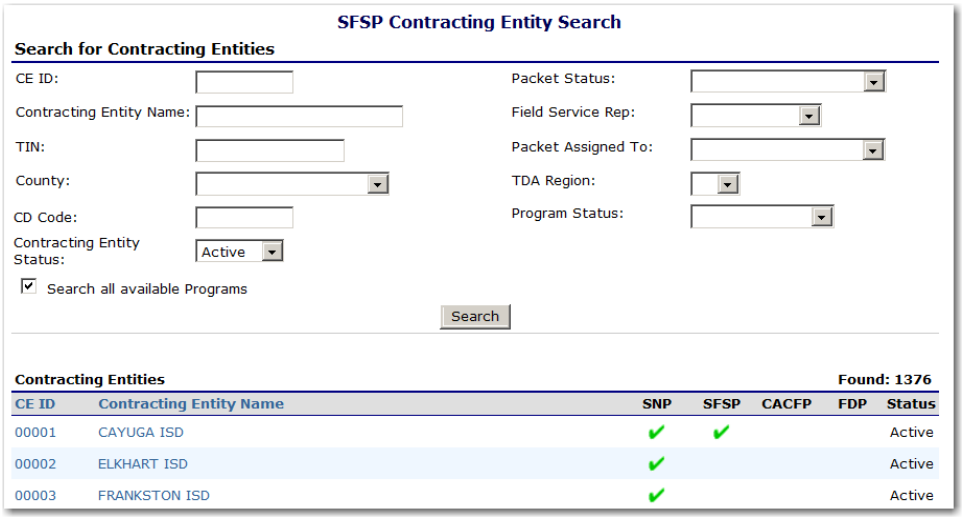



**Figure 11: Contracting Entity Search screen – "Search all available Programs" example**

3

# Applications

*Now that you know how to access and log on to TX-UNPS, the remainder of the manual will explore the functions of the Summer Food Service Program module. Let's first look at the Applications component of TX-UNPS, where users manage yearly enrollment of Contracting Entities and sites and submit/review Advance Requests.*

## About the School Year Enrollment Process

In order to participate in the Summer Food Service Program, Contracting Entities must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Contracting Entities must select the "Add" action on the Application Packet screen. The user is then transferred to a blank SFSP Contracting Entity application screen. A new Application Packet must be submitted and approved for each program year. Once the Application Packet is approved, monthly claims for reimbursement may be submitted.

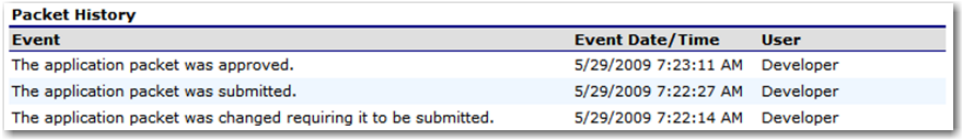
**Figure 12: Enrolling in a New Program Year**

# Submitting an Application Packet

The Contracting Entity can submit the Application Packet to the State once the application is deemed complete by the system. In order to be able to submit an Application Packet, the packet must contain:

- A completed Contracting Entity Application with no errors.
- At least one completed SFSP Site Application with no errors.
- A completed Management Plan with no errors.
- A completed Budget Detail with no errors if the Contracting Entity:
    - had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application) OR
    - is identified as a Type of Agency of "Private Non Profit Organization" (i.e., on their CE Profile).
- All items in the Checklist are identified as submitted to TDA.

Once the Application Packet has been submitted to the State for approval, the packet history section of the Application Packet screen will display the event and the packet status changes to **Submitted for Approval.**



**Packet History**

| Event | Event Date/Time | User |
|---|---|---|
| The application packet was approved. | 5/29/2009 7:23:11 AM | Developer |
| The application packet was submitted. | 5/29/2009 7:22:27 AM | Developer |
| The application packet was changed requiring it to be submitted. | 5/29/2009 7:22:14 AM | Developer |

**Figure 13: Packet History (sub-section of the Application Packet screen)**

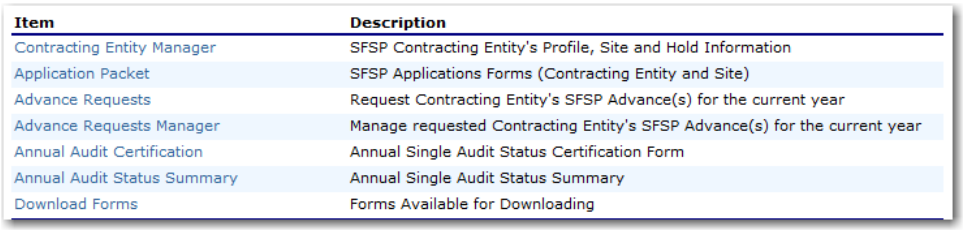
# Applications Menu

The Applications menu is the starting point for all tasks related to the annual Summer Food Service Program enrollment process. Menu items are based on security levels.

## To access the Applications Menu

1. On the blue menu bar, select **Applications.** The Applications Menu displays.
2. Select an application item to access that application function.

The following figure displays the complete list of Applications menu items for authorized state users. It is important to note that Contracting Entities have significantly fewer Applications menu items.



| Item | Description |
|---|---|
| Contracting Entity Manager | SFSP Contracting Entity's Profile, Site and Hold Information |
| Application Packet | SFSP Applications Forms (Contracting Entity and Site) |
| Advance Requests | Request Contracting Entity's SFSP Advance(s) for the current year |
| Advance Requests Manager | Manage requested Contracting Entity's SFSP Advance(s) for the current year |
| Annual Audit Certification | Annual Single Audit Status Certification Form |
| Annual Audit Status Summary | Annual Single Audit Status Summary |
| Download Forms | Forms Available for Downloading |

**Figure 14: SFSP Applications Menu screen (State view)**

# ***Application Packet***

In order to participate in the Summer Food Service Program (SFSP), Contracting Entities must submit an Application Packet to the State for review and approval. At the beginning of each program year, Contracting Entity data is rolled over and must be verified by Contracting Entities prior to submitting any claims.

The Application Packet contains the Contracting Entity application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an error within a form or a checklist item needs to be completed), a red arrow displays next to the Application Packet item. If the Application Packet item has been completed correctly and contains no errors, a green check displays next to the Application Packet item. For more details, see ***Reviewing an Application***.

**Note:** Contracting Entities may not submit claims until their Application Packet has been approved for the respective program year.

**Note:** Once an Application Packet has been approved, when a Contracting Entity revises any item within the Application Packet, the Application Packet must be re-submitted for approval.

## To access the Application Packet

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. If necessary, search for and select a Contracting Entity. The Application Packet screen displays.
3. Select the packet item you want to access.

| Action | Form Name | Latest Version | Status |
|---|---|---|---|
| View \| Revise | ✔ Contracting Entity Application | Original | Approved |
| Details | ✔ Food Production Facility List (2) | | |
| Details | Site Field Trip List | | |
| View \| Revise | ✔ Budget Detail | Original | Approved |
| Details | ✔ Management Plan | Original | Approved |
| Details | ✔ Checklist Summary (4) | | |
| Details | Application Packet Notes (1) | | |

**Figure 15: Application Packet screen**

If the Application Packet is under review by the State, it becomes “read only” to the Contracting Entity. The Application Packet screen is displayed with the following message to help make the Contracting Entity aware that they can no longer modify the submitted packet during this time.

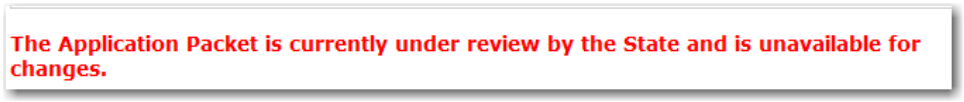



**Figure 16: Application Packet screen – Message**

### *Contracting Entity Application*

The Contracting Entity Application screen provides access to the Contracting Entity's annual application for the Summer Food Service Program. The Contracting Entity is required to complete a new Contracting Entity application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

## To view a Contracting Entity application (Original)

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Select View next to the **Contracting Entity Application** packet item. The Contracting Entity Application for the designated school year is displayed.

**Note:** If there are multiple versions of a Contracting Entity application within the system (i.e., revisions exist), the system defaults to the version with the most current Application Effective Date designated on the Contracting Entity Application's Internal Use Only section.

## To view a Contracting Entity application (Revision)

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select the revision link under the **Latest Version** column. The Contracting Entity Application History for the designated school year is displayed.
4. Select the application version you would like to view.

**TIP:** The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore can no longer be modified.

## To add a Contracting Entity application (New Contracting Entity)

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Add next to the **Contracting Entity Application** packet item. The Contracting Entity Application for the designated program year is displayed.
4. Enter required information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Contracting Entity Application screen.

   -OR-

   Select **Finish** to return to the Application Packet screen.

**TIP:** The Add option only appears for new Contracting Entities. If a Contracting Entity had an application in the previous year and has elected to enroll in the new year, the prior year's application information is rolled over into the new year's application as a starting point. The user would select **Modify** to review and update this information.

## To modify a Contracting Entity application

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Contracting Entity Application** packet item. The Contracting Entity Application for the designated program year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Contracting Entity Application screen.

   -OR-

   Select **Finish** to return to the Application Packet screen.

**TIP:** The Modify option only appears when the Application Packet has not been submitted. Once an application has been submitted and approved by the State, a revised application must be submitted (i.e., the Revise option is displayed).

## To delete a Contracting Entity application

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Contracting Entity Application** packet item. The Contracting Entity Application for the designated program year is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

**WARNING**: A Contracting Entity application can only be deleted if the Contracting Entity has not yet submitted any claims for the program year.

Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

## To revise a Contracting Entity application

**Note:** Only state-approved applications can be revised. Once a Contracting Entity revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Revise next to the **Contracting Entity Application** packet item. The Contracting Entity Application for the designated school year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Contracting Entity Application screen you just modified.

-OR-

Select **Finish** to return to the Application Packet screen.

**TIP:** The Revise option only appears when the previously submitted Application Packet has been approved by the state.

## *Site Applications – Summer Food Service Program*

Contracting Entities must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the Summer Food Service Program for both new and renewing sites. Sites must complete a new application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

## To access the Contracting Entity's site list

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

**Figure 17: Application Packet – SFSP Site List screen**

## To add a new site (only available to Contracting Entities)

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. At the bottom of the site list, select **Add Site Application.** The SFSP Available Site(s) screen displays.

   **Note:** The sites displayed on this screen are sites that are designated as SFSP sites on the Site Profile screen, but who do not have a site application.

5. If the site you would like to add an application for is listed, select the site. If the site you

would like to add an application for is not listed, select **Add New Site.** The 'Quick' Site Profile screen displays.

6. The system automatically defaults the Site ID to the next available ID for this Contracting Entity.

**TIP:** For most Contracting Entities, it is highly recommended that you use the Site ID assigned by the system. The system has verified that the assigned ID is unique and is the next available Site ID for the Contracting Entity. However, public/charter schools should use the campus code assigned by the Texas Education Agency.

7. Enter the Site Name and County.

8. Select **Save.** The Site Application for the new site is displayed.

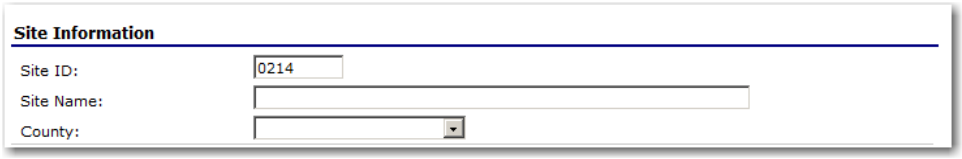



**Figure 18: 'Quick' Site Profile screen**

## To view a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

4. Select View next to the site whose application you would like to view. The site's Site Application is displayed.

## To modify a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select Modify next to the site whose application you would like to view. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.
   -OR-
   Select **Finish** to return to the SFSP Site List screen.
8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

## To delete a Site Application

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select Modify next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Select **DELETE** on the Edit menu in the top-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.

**WARNING**: Only a site application that has not been approved can be deleted. Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

## To revise a Site Application

**Note:** Only state-approved applications can be revised. An application that has been submitted BUT is currently under review by the State CANNOT be revised.

Once a Contracting Entity revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select Revise next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.

   -OR-

   Select **Finish** to return to the SFSP Site List screen.

**TIP:** The Revise option only appears when the previously submitted Application Packet has been approved by the state.

## Closing a Site

A site may be closed within the system, whereby applications cannot be submitted for the site.

## To close a Site

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select the link under the Latest Version column. The Site Application History screen is displayed.
5. Select **Close Site**. The End Site Agreement screen is displayed.
6. Enter the **Closed/Terminated Date**. If the Contracting Entity is entering site level claims, the Days of Operation fields for this site will edit check with this date to ensure meals aren't claimed after the entered date.
7. Select the **Closed/Terminated Code**.
8. Enter the **Closed/Terminated Reason**.
9. If desired, provide a description as to why the site is being closed in the **Closed/Terminated Comment**.
10. Select **Save**. The Site Application History screen is displayed with a message stating that the site's enrollment is closed.

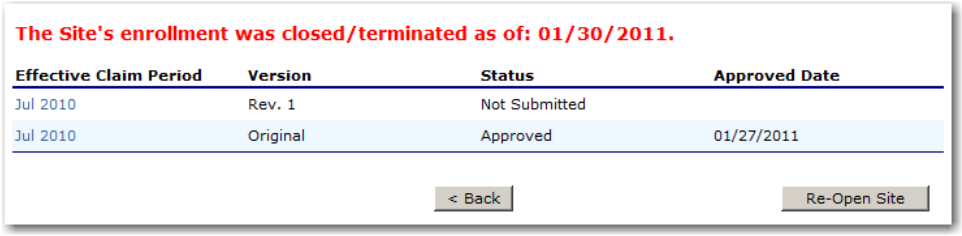



**Figure 19: Example of a Confirmation of a Closed Site**

### *Food Production Facility*

The Food Production Facility section of the Application Packet contains information about each food production facility that the Contracting Entity will use to provide meals to its sites.

## To access the Food Production Facility List

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.

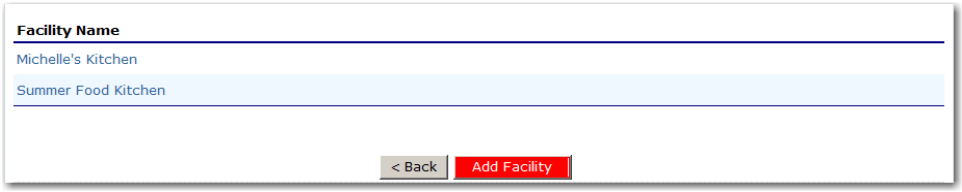



**Figure 20: Food Production Facilities list screen**

## To add a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the **Add Facility** button. A blank Food Production Facility screen for the specified year is displayed.
5. Complete the form.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Production Facility screen.
   -OR-
   Select **Finish** to return to the Food Production Facilities list screen.

## To modify a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the facility you want to modify. The Food Production Facility screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Production Facility screen.
   -OR-
   Select **Finish** to return to the Food Production Facilities list screen.

## To delete a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the facility you want to delete. The Food Production Facility screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

**WARNING**: Once the facility has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a contract.

## Site Field Trip

The Site Field Trip section of the Application Packet contains information about any field trips that an approved site will conduct for the specified year. Note: Only approved sites can be associated with a Site Field Trip. Therefore, an initial review of an Application Packet will not include Site Field Trip forms because the State has not yet approved any sites.

## To access the Site Field Trip List

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.

**Figure 21: Site Field Trip list screen**

## To add a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the **Create New Field Trip** button. A blank Site Field Trip screen for the specified year is displayed.
5. Select the Contracting Entity's Site that will conduct the field trip.
6. Select the **Continue** button. The Site Field Trip screen is re-displayed with the selected site at the top of the page and field trip fields required for completion.
7. Complete the form.
8. Select **Save**. A confirmation screen displays.
9. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

**TIP:** A field trip can be added ONLY for approved SFSP sites (i.e., an approved SFSP site application for the designated year).

## To modify a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to modify. The Site Field Trip screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

## To cancel a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to cancel. The Site Field Trip screen displays.
5. Check the box in question 6 “Cancel Request”.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

**TIP:** Only approved field trips can be cancelled. If the field trip is not approved, but it will no longer occur, use the Delete feature.

**WARNING:** A cancelled field trip cannot be "un-cancelled". If the Contracting Entity decides to re-instate the field trip, a new field trip must be added.

## To delete a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to delete. The Site Field Trip screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

**TIP:** A field trip cannot be deleted once it is approved. If the field trip will not occur, see the "To cancel a Site Field Trip" section.

**WARNING**: Once the field trip has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a field trip.

## *Budget Detail*

The Budget Detail screen must be completed by Contracting Entities that:

- had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application) OR
- is identified as a Type of Agency of "Private Non Profit Organization" (i.e., on their CE Profile).

In these instances, the system will not allow an Application Packet to be submitted without completion of the Budget Detail screen, with no errors.

In addition, the Budget Detail must be completed if an Advance Request is submitted; however, the submission of an Advance Request occurs outside of the system's Application Packet sub-module and therefore must be manually validated by the State.

Once a Budget is approved, a revision (i.e., a new version) must be created.

### To access the Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **View** next to **Budget Detail**. The most current Budget Detail screen displays.

**Note:** If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

### To add a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Budget Detail**. A blank Budget Detail screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

   -OR-

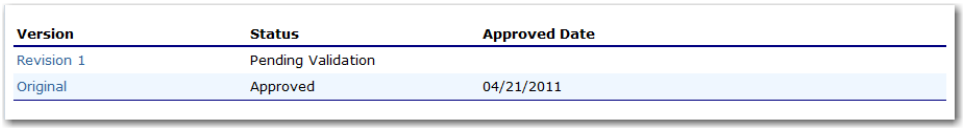
Select **Finish** to return to the Application Packet screen.

## To view a Budget Detail

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Budget Detail, select **View** next to Budget Detail. The Budget Detail screen displays.

   –OR-

   To view a prior Budget Detail, select the revision link under the **Latest Version** column. The Contracting Entity Budget History for the designated school year is displayed.



| Version | Status | Approved Date |
|---|---|---|
| Revision 1 | Pending Validation | |
| Original | Approved | 04/21/2011 |

**Figure 22: Contracting Entity Budget History screen**

4. Select the budget version you would like to view.

## To modify a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

   -OR-

   Select **Finish** to return to the Application Packet screen.

## To revise a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Budget Detail**. The Budget Detail screen displays with the most current budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

   -OR-

   Select **Finish** to return to the Application Packet screen.

**TIP:** When creating a revision, the system maintains the previously-approved budget that can be accessed via the Contracting Entity Budget History screen.

## *Management Plan*

Contracting Entities must submit a Management Plan as part of the Application Packet. The system will not allow an Application Packet to be submitted without completion of the Management Plan screen, with no errors. Once a Management Plan is approved, a revision (i.e., a new version) must be created.

### To access the Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **View** next to **Management Plan**. The most current Management Plan screen displays.

   **Note:** If there are multiple versions of a Management Plan within the system (i.e., revisions exist), the system defaults to the most current version.

### To add a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Management Plan**. A blank Management Plan screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

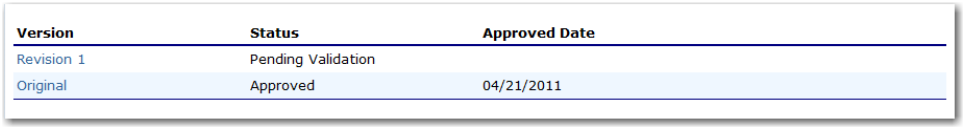
### To view a Management Plan

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Management Plan, select **View** next to **Management Plan**. The

Management Plan screen displays.

–OR-

To view a prior Management Plan, select the revision link under the **Latest Version** column. The Contracting Entity Management Plan History for the designated program year is displayed.



| Version | Status | Approved Date |
|---|---|---|
| Revision 1 | Pending Validation | |
| Original | Approved | 04/21/2011 |

**Figure 23: Contracting Entity Management Plan History screen**

4. Select the Management Plan version you would like to view.

## To modify a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Management Plan**. The Management Plan screen displays with the most current, un-submitted Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

## To revise a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Management Plan**. The Management Plan screen displays with the most current Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

   -OR-

   Select **Finish** to return to the Application Packet screen.

**TIP:** When creating a revision, the system maintains the previously-approved Management Plan that can be accessed via the Contracting Entity Management Plan History screen.

## *Checklist*

A checklist is automatically generated based upon answers to specific questions from the Contracting Entity and site applications. The checklist identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Contracting Entities to keep track of documents and their dates of submission. State users use this feature to identify when documents have been received and to denote the status of the documents.

## To access a Checklist

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.

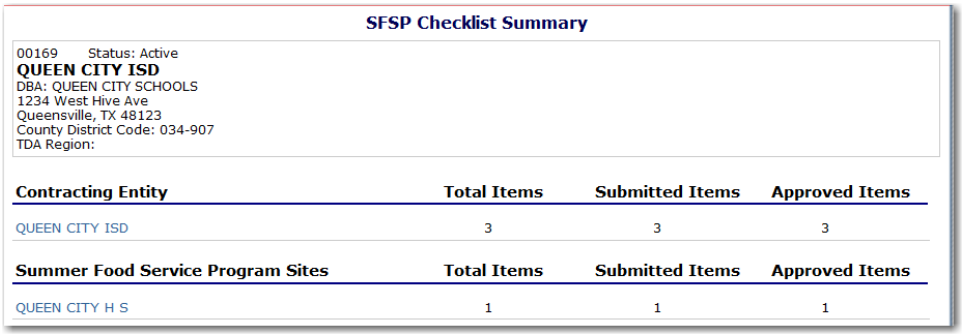
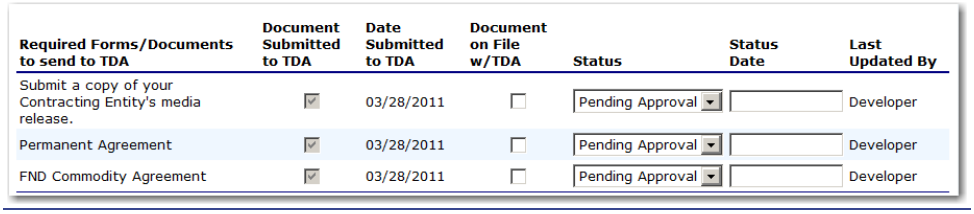



**Figure 24: Checklist Summary screen**

## To view a Checklist

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Contracting Entity or Site whose checklist you wish to view. The Checklist screen displays.

**Note**: Only Contracting Entities and sites who have completed their applications and who have additional required documents will have a checklist.



| Required Forms/Documents to send to TDA | Document Submitted to TDA | Date Submitted to TDA | Document on File w/TDA | Status | Status Date | Last Updated By |
|---|---|---|---|---|---|---|
| Submit a copy of your Contracting Entity's media release. | ☑ | 03/28/2011 | ☐ | Pending Approval | | Developer |
| Permanent Agreement | ☑ | 03/28/2011 | ☐ | Pending Approval | | Developer |
| FND Commodity Agreement | ☑ | 03/28/2011 | ☐ | Pending Approval | | Developer |

**Figure 25: Checklist screen**

## To update a Checklist

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Contracting Entity or Site whose checklist you wish to update. The Checklist screen displays.
5. Identify whether the document has been submitted and the submission date. The Date Submitted to TDA field automatically defaults to the system date. This can be changed by the user. A checklist is not considered complete until all checklist items are identified as having been submitted to TDA.
6. Select Save. The Checklist Summary screen displays.

## To upload an attachment to a Checklist item

**Note**: If the checklist item has a paper clip icon next to it, you can upload an attachment. Files in the following formats can be uploaded: .doc, .xls, .pdf, and .jpg.

1. Select the paper clip. The Checklist File Upload Details screen displays.
2. Use the **Browse** button to select the file to upload. If desired, enter a brief comment (field is not required)
3. Select **Save**.

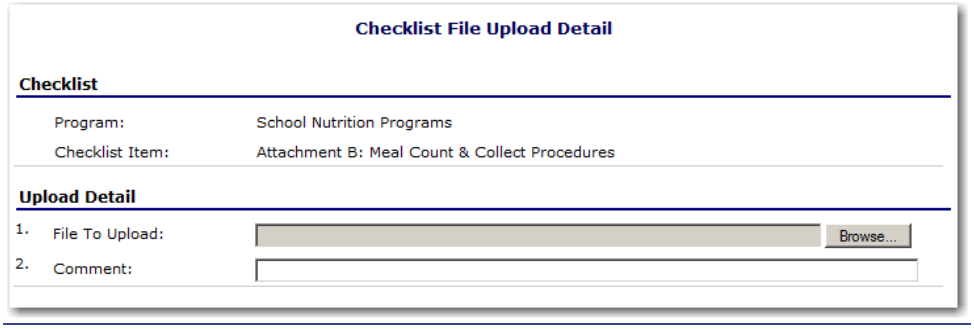


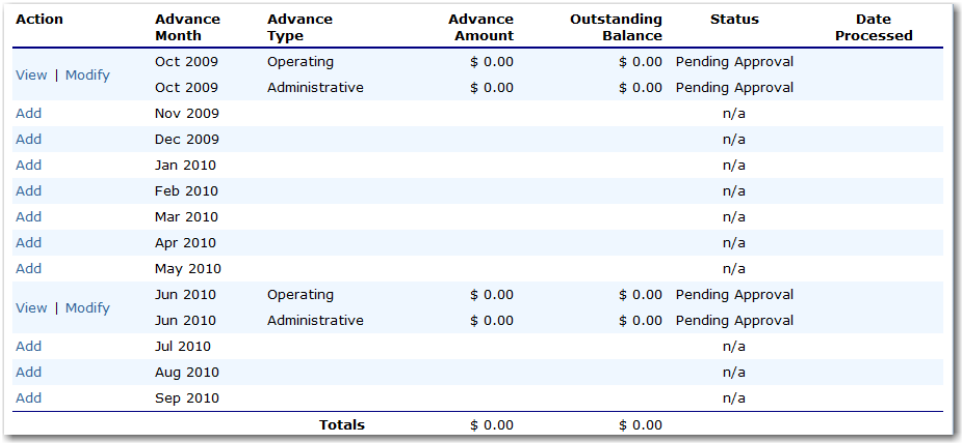

**Figure 26: Checklist File Upload Detail screen**

## Advance Requests

Contracting Entities use the Advance Requests menu option to submit a request for operational or administrative payment advances and to view the status of their submitted requests. This screen is Contracting Entity-specific.

## To access Advance Requests

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.



| Action | Advance Month | Advance Type | Advance Amount | Outstanding Balance | Status | Date Processed |
|---|---|---|---|---|---|---|
| View \| Modify | Oct 2009 | Operating | $ 0.00 | $ 0.00 | Pending Approval | |
| | Oct 2009 | Administrative | $ 0.00 | $ 0.00 | Pending Approval | |
| Add | Nov 2009 | | | | n/a | |
| Add | Dec 2009 | | | | n/a | |
| Add | Jan 2010 | | | | n/a | |
| Add | Feb 2010 | | | | n/a | |
| Add | Mar 2010 | | | | n/a | |
| Add | Apr 2010 | | | | n/a | |
| Add | May 2010 | | | | n/a | |
| View \| Modify | Jun 2010 | Operating | $ 0.00 | $ 0.00 | Pending Approval | |
| | Jun 2010 | Administrative | $ 0.00 | $ 0.00 | Pending Approval | |
| Add | Jul 2010 | | | | n/a | |
| Add | Aug 2010 | | | | n/a | |
| Add | Sep 2010 | | | | n/a | |
| | | **Totals** | $ 0.00 | $ 0.00 | | |

**Figure 27: Advance Request list screen**

## To add an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select Add next to the advance month for which you would like an advance. The Advance Request screen displays.
4. Select the type of advance you are requesting.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.
   -OR-
   Select **Finish** to return to the Advance Requests list screen.

**Note:** At least one site must have at least ten (10) operating dates in the advance month to request an advance.

**Note:** A Contracting Entity may request up to three (3) Operating Advances and up

to two (2) Administrative advances for a designated program year.

## To view or modify an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to view or modify. The Advance Request screen displays.
4. Update information, if desired.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.
   -OR-
   Select **Finish** to return to the Advance Requests list screen.

## To delete an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to delete. The Advance Request screen displays.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.

**WARNING**: Only Advance Requests that have not been submitted can be deleted. Selecting the DELETE button permanently deletes the Advance Request from the system. It will not be recoverable once deleted.

# Download Forms

The Download Forms function allows users to view, download and/or print all forms and documents made available on the site by the State.

## To access Download Forms

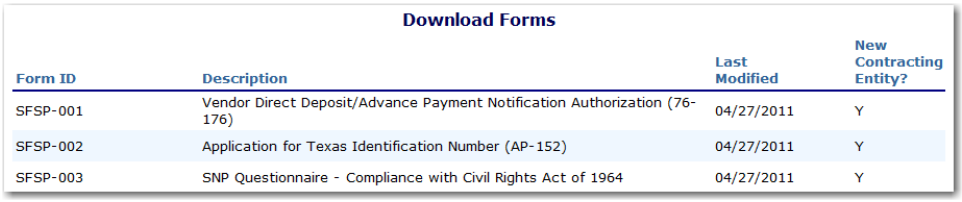
1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Download Forms**. The Download Forms screen displays.

## To download or view a form

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.
3. Select the Form ID of the form you wish to download. If the form is a document, a gray dialog box appears.
4. Select **Open** to view the form.
   - OR -
   Select **Save** to save the form to your computer.

**Note:** The software application associated with the form will initiate the opening of the form. For example, if the form is a Microsoft Word document, Microsoft Word on your desktop will initiate the opening of the form. This is also true with Microsoft Excel or Adobe Acrobat forms.

5. Select the <**Back** button to return to the previous screen.



**Download Forms**

| Form ID | Description | Last Modified | New Contracting Entity? |
|---|---|---|---|
| SFSP-001 | Vendor Direct Deposit/Advance Payment Notification Authorization (76-176) | 04/27/2011 | Y |
| SFSP-002 | Application for Texas Identification Number (AP-152) | 04/27/2011 | Y |
| SFSP-003 | SNP Questionnaire - Compliance with Civil Rights Act of 1964 | 04/27/2011 | Y |

**Figure 28: Download Forms screen (partial screen)**

**TIP:** The New Contracting Entity? column indicates whether the form is required for submission by Contracting Entities new to the Summer Food Service Program.

4

# Claims

*The TX-UNPS Claims component allows Contracting Entities to submit monthly online reimbursement claim requests to the State, review claim rates, and review historical payment summaries.*

## About the Claims Process

A Contracting Entity submits a reimbursement claim to the State for every month in which one or more sites participate in the Summer Food Service Program. Contracting Entities may enter Contracting Entity and site information into the monthly claim form beginning at the first of every month. Contracting Entities have sixty days from the last day of the claim month/year to submit an original claim. At the time claims are submitted, the submitted claim is reviewed by the system to ensure that it confirms to established business rules governing reimbursement claim eligibility and approval.

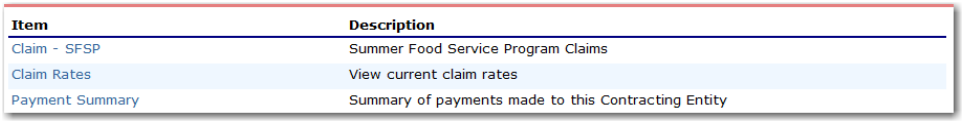
**Note:** Claims cannot be created for a month if there is no approved Application Packet in effect for that period. If you cannot access claims for a specific month, be sure your Application Packet has been approved. If your Application Packet has been approved and you still cannot enter a claim for a specific month, contact the TX-UNPS Help Desk to validate the effective date of the Contracting Entity application and Site application.

The following table identifies the steps related to submitting and processing a claim:

| Performed by | Task |
|---|---|
| **Contracting Entity** | Complete the Claim for Reimbursement form(s) for the selected claim month.<br><br>Submit error-free claim to the State for processing. |
| **State** | Review and approve claim.<br><br>Select claim for inclusion in the payment process.<br><br>Send payment information to the appropriate State agency for payment. |

# Claims Menu

Contracting Entities use the Claims menu to access SFSP claim functions, view current claim rates, or view payment summaries.



| Item | Description |
|---|---|
| Claim - SFSP | Summer Food Service Program Claims |
| Claim Rates | View current claim rates |
| Payment Summary | Summary of payments made to this Contracting Entity |

**Figure 29: Claims Menu screen**

# Claim Dates

Various dates are used in the TX-UNPS claims function. The following table identifies and describes the dates used:

| Date | Description |
|---|---|
| **Date Created** | This date is set to the current system date when the claim is initially created. |
| **Date Modified** | This date is set to the current system date when the claim is initially created and each time the claim is saved. |
| **Date Received** | This date is typically set to the date the claim was first submitted to the State. The date can be changed by an authorized State user via the Internal Use Only section of the claim form until the claim has been processed for payment. The value of this field is used to validate the 60 day claim rules. |
| **Date Accepted** | This date is set to the current system date each time the claim is submitted for payment and contains no errors. If errors are detected during the submit process, the date is not set.<br>These claims are identified with a status of "Accepted". Accepted claims can be modified until they are included in a payment batch. |
| **Date Processed** | This is the date that the claim was added by the State into the batch payment process (via Payment Tracking in the Accounting module). Once the claim has been added to a batch (i.e., "batched"), it cannot be modified.<br>These claims are identified with a status of "Accepted*" until the batch process has completed. When the batch process is completed, the status of the claim is "Processed".<br>If a change is required to a claim that has a status of "Accepted*" or "Processed", a revised claim must be entered into the system. |

# Claim

The SFSP claim function is used to enter, modify, and view claims. The system provides the ability to submit claims at the Contracting Entity or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 60-days since the last day of claim month/year. In order to create a claim in a given month, an approved Application Packet must be in effect for the period.

**WARNING**: Only Contracting Entities authorized by the State can submit site-level claims. Please contact the TX-UNPS Help Desk if you are interested in site-level claiming.

## To access Claim - SFSP

1. On the blue menu bar, select **Claims**. The Claims menu screen displays.
2. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.

   If a Contracting Entity has already been selected, the Claim Summary screen displays.

   If no Contracting Entity has been selected, use the Contracting Entity Search to search for and select a Contracting Entity.
3. Select the Claim Month you would like to submit a claim. The Claim Month Details screen displays.

**Note:** The current school year is the default year if no other school year has been selected. For help selecting a new school year, see ***Selecting a School Year***.

## *Claim Year Summary*

The Claim Year Summary summarizes information regarding the claim for each claim month in the designated year:

- Adj Number: identifies the number of revisions associated with the claim. Each revision must be re-processed by the state.
- Claim Status: identifies the current status of the claim.
- Date Received: identifies the date the system initially received the claim submission. Note: the State has the authority to modify this date.
- Date Processed: identifies the date the claim was included in the payment batch process.
- Earned Amount: identifies the current value of the claim.

**Note:** Only months that are identified as valid operational months for the Contracting Entity are enabled to submit claims.

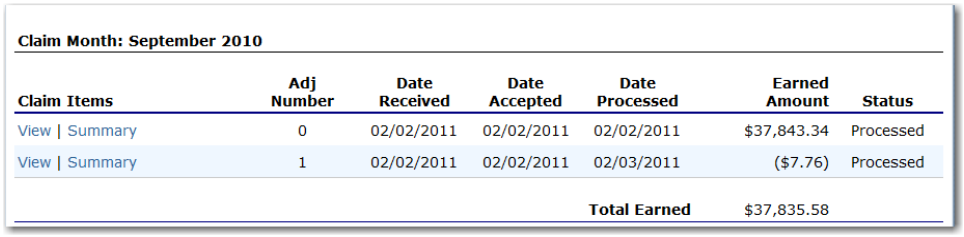
| Claim Month | Adj Number | Claim Status | Date Received | Date Processed | Earned Amount |
|---|---|---|---|---|---|
| Jul 2010 | | | | | $0.00 |
| Aug 2010 | | | | | $0.00 |
| Sep 2010 | 1 | Processed | 02/02/2011 | 02/03/2011 | $37,835.58 |
| Oct 2010 | 0 | Processed | 02/03/2011 | 02/03/2011 | $34,291.36 |
| Nov 2010 | | | | | $0.00 |
| Dec 2010 | | | | | $0.00 |
| Jan 2011 | | | | | $0.00 |
| Feb 2011 | | | | | $0.00 |
| Mar 2011 | | | | | $0.00 |
| Apr 2011 | | | | | $0.00 |
| May 2011 | | | | | $0.00 |
| Jun 2011 | | | | | $0.00 |
| | | | | **Year to Date Totals** | **$72,126.94** |

**Figure 30: Claim Year Summary screen**

## *Claim Month Details*

From the Claim Month Details screen, you can access a specific claim form or a summary of the submitted claim.

If the claim has been processed, the options are View (to view the completed claim form) or Summary (to view the calculated payment summary related to the claim).

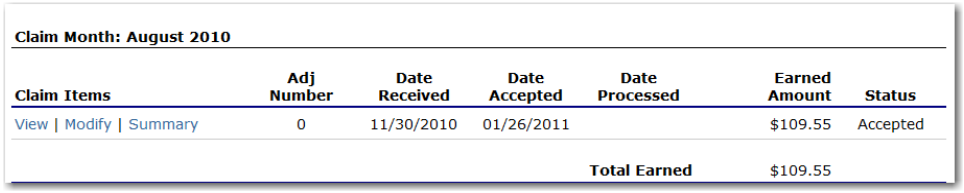


**Claim Month: September 2010**

| Claim Items | Adj Number | Date Received | Date Accepted | Date Processed | Earned Amount | Status |
|---|---|---|---|---|---|---|
| View \| Summary | 0 | 02/02/2011 | 02/02/2011 | 02/02/2011 | $37,843.34 | Processed |
| View \| Summary | 1 | 02/02/2011 | 02/02/2011 | 02/03/2011 | ($7.76) | Processed |
| | | | | Total Earned | $37,835.58 | |

**Figure 31: Claim Month Details screen – Example of Processed Claims**

If the claim has not been processed, the options are View (to view the completed claim form), Modify (to enter a new claim or modify an existing claim) or Summary (to view the calculated payment summary related to the claim).



**Claim Month: August 2010**

| Claim Items | Adj Number | Date Received | Date Accepted | Date Processed | Earned Amount | Status |
|---|---|---|---|---|---|---|
| View \| Modify \| Summary | 0 | 11/30/2010 | 01/26/2011 | | $109.55 | Accepted |
| | | | | Total Earned | $109.55 | |

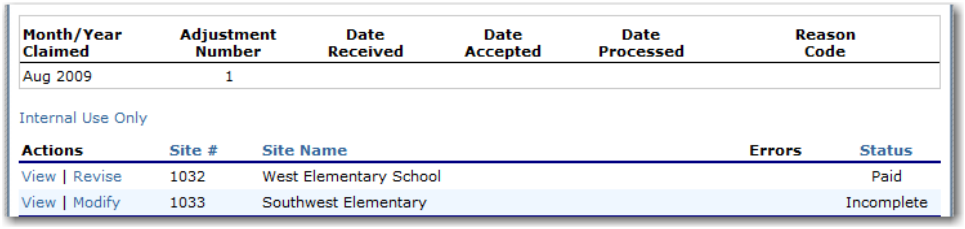
**Figure 32: Claim Month Details screen – Example of Non-Processed Claims**

**Note:** Claims can be modified UNTIL they have been added by the State into the batch payment process. Once a claim has been included in a payment batch, the status of the claim is "Accepted*" until the batch process has completed. When the batch process has completed, the status of the claim is "Processed".

## *Claim Site List*

If the Contracting Entity has been identified by the State as performing site-level claiming on the Contracting Entity Profile screen, the Contracting Entity would use the Claim Site List screen to select the site whose claim to add, view, or modify.

**Note:** Only active sites will have a link to open the Claim for Reimbursement screen.



| Month/Year Claimed | Adjustment Number | Date Received | Date Accepted | Date Processed | Reason Code |
|---|---|---|---|---|---|
| Aug 2009 | 1 | | | | |

Internal Use Only

| Actions | Site # | Site Name | Errors | Status |
|---|---|---|---|---|
| View \| Revise | 1032 | West Elementary School | | Paid |
| View \| Modify | 1033 | Southwest Elementary | | Incomplete |

**Figure 33: Claim Site List screen**

## To add an original claim

Claims can be entered for each eligible month in the school year. Eligible months are determined based on an approved Application Packet and the designated application effective date (identified by the State in the Internal Use Only section of the Contracting Entity and Site applications).

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Add Original Claim** button. If the Contracting Entity is performing CE-level claiming, the Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays.

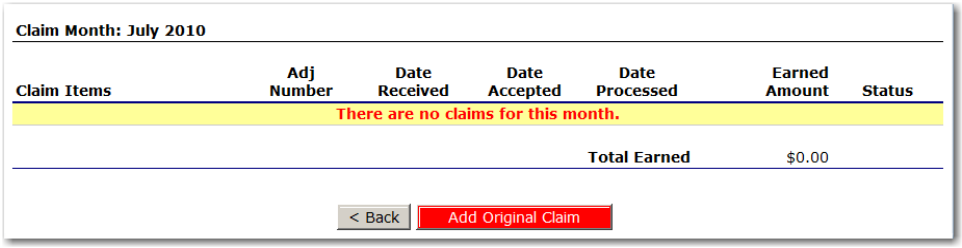



**Figure 34: Claim Month Details screen – Add Original Claim**

**Note**: The **Add Original Claim** button will only display on Claim Month Details screens that currently have no claims created.

4. Enter claim information for all enrolled programs. Only the programs identified in an approved Application Packet with the appropriate effective date will be available for data entry.
5. Select **Save**. The Claim Month Details screen displays.
6. Review the information.

   To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen

   To submit the claim, check the Certification box and select the **Submit for Payment** button.

**Note**: When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

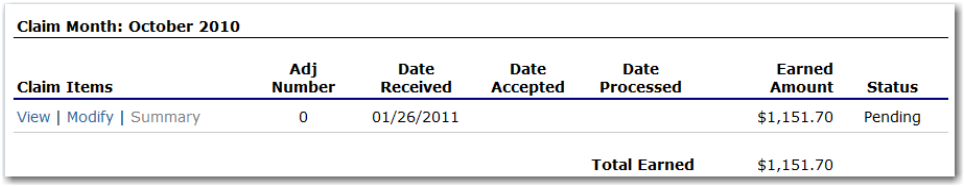
**WARNING**: An original claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

## To modify an un-processed claim

Claims can be modified as many times as desired until the claim has been submitted **and** processed by the State for payment distribution.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays



Claim Month: October 2010

| Claim Items | Adj Number | Date Received | Date Accepted | Date Processed | Earned Amount | Status |
|---|---|---|---|---|---|---|
| View \| Modify \| Summary | 0 | 01/26/2011 | | | $1,151.70 | Pending |
| | | | | Total Earned | $1,151.70 | |

**Figure 35: Claim Month Details screen – Modify an Un-processed Claim**

**Note**: The Summary link is not active until a claim has been submitted with no errors.

4. Update claim information.
5. Select **Save**. The Claim Month Details screen displays.
6. Review the information.

   To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen

   To submit the claim, check the Certification box and select the **Submit for Payment** button.

**Note**: When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

**WARNING**: An original claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

## To revise a processed Contracting Entity-level claim

Claim revision resulting in a downward adjustment may be submitted at any time. Claim revisions resulting in an upward adjustment may be submitted if the date of submission is within 60 days of the last day of the original claim month. Revised claims must be re-processed by the State regardless of their original status.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Add Revision** button. The Claim for Reimbursement screen displays.

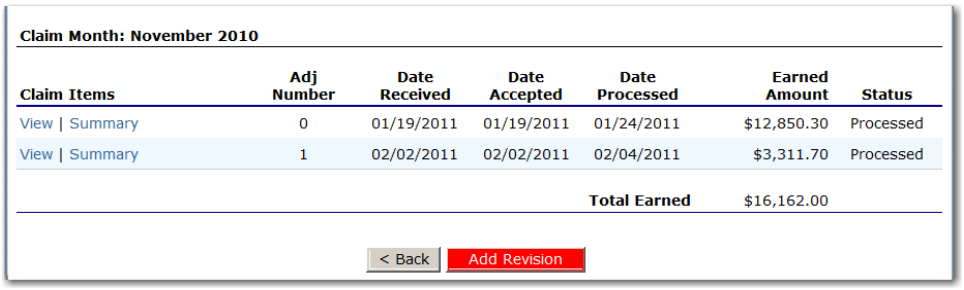



**Figure 36: Claim Month Details screen – Add Revision**

If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The Claim for Reimbursement screen displays

**Note**: The **Add Revision** button will only display on Claim Month Details screens that currently have no claims created.

4. Make any necessary changes to the claim.
5. Select **Save**. The Claim Month Details screen displays.
6. Review the information.

   To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen

   To submit the revised claim, check the Certification box and select the **Submit for Payment** button.

**Note**: Revised claims must be re-processed by the State regardless of their original status.

**WARNING**: An upward adjusted claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

## To view a claim

1. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **View.** The Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **View** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays

## To view a Claim Summary

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page. A Claim Summary is not available until a claim has been submitted with no errors.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Summary.** The Claim for Reimbursement Summary screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Summary** to the left of the Site Name you wish to view. The Claim for Reimbursement Summary screen displays

Period Covered From: 01/03/2011 To: 01/28/2011

| Meal Description | Number of Participating Sites | Total Number of Days Food Served | ADP |
|---|---|---|---|
| Breakfast | 1 | 20 | 250 |
| AM Snack | 0 | 0 | 0 |
| Lunch | 1 | 20 | 250 |
| PM Snack | 0 | 0 | 0 |
| Supper | 0 | 0 | 0 |

**Self-Prep and/or Vended-Rural Meals Served to Children**

| Meal Description | First Meals Served (A) | Second Meals Served (B) | Second Meals Allowed (C) | Camp Meals Served (D) | Reimbursable Meals Total (A+C+D) |
|---|---|---|---|---|---|
| Breakfast | 5,000 | 333 | 100 | 0 | 5,100 |
| AM Snack | 0 | 0 | 0 | 0 | 0 |
| Lunch | 5,000 | 333 | 100 | 0 | 5,100 |
| PM Snack | 0 | 0 | 0 | 0 | 0 |
| Supper | 0 | 0 | 0 | 0 | 0 |

**Vended-Urban Meals Served to Children**

| Meal Description | First Meals Served (A) | Second Meals Served (B) | Second Meals Allowed (C) | Camp Meals Served (D) | Reimbursable Meals Total (A+C+D) |
|---|---|---|---|---|---|
| Breakfast | 0 | 0 | 0 | 0 | 0 |
| AM Snack | 0 | 0 | 0 | 0 | 0 |
| Lunch | 0 | 0 | 0 | 0 | 0 |
| PM Snack | 0 | 0 | 0 | 0 | 0 |
| Supper | 0 | 0 | 0 | 0 | 0 |

**Administrative Reimbursement - Self-Prep and/or Vended Rural**

| Meal Description | Total Reimbursable Meals Served | Reimbursement Rate | Reimbursement Amount |
|---|---|---|---|
| Breakfast | 5,100 | 0.1800 | 918.00 |
| AM Snack | 0 | 0.1000 | 0.00 |
| Lunch | 5,100 | 0.3200 | 1,632.00 |
| PM Snack | 0 | 0.1000 | 0.00 |
| Supper | 0 | 0.3200 | 0.00 |
| **Total** | | | **2,550.00** |

**Administrative Reimbursement - Vended-Urban**

| Meal Description | Total Reimbursable Meals Served | Reimbursement Rate | Reimbursement Amount |
|---|---|---|---|
| Breakfast | 0 | 0.1500 | 0.00 |
| AM Snack | 0 | 0.0900 | 0.00 |
| Lunch | 0 | 0.2700 | 0.00 |
| PM Snack | 0 | 0.0900 | 0.00 |
| Supper | 0 | 0.2700 | 0.00 |
| **Total** | | | **0.00** |

**Claim Reimbursement Total** **26,316.00**

| Contracting Entity Claim Reimbursement Totals | Operating Reimbursement | Administrative Reimbursement | Reimbursement Totals |
|---|---|---|---|
| Current Claim Earnings | 23,766.00 | 2,550.00 | 26,316.00 |
| Previous Claim Earnings | 0.00 | 0.00 | 0.00 |
| Earned Amount | 23,766.00 | 2,550.00 | 26,316.00 |
| Current Advance Recovered | 0.00 | 0.00 | 0.00 |
| **Net Claim Reimbursement Total** | **23,766.00** | **2,550.00** | **26,316.00** |

**Figure 37: Claim for Reimbursement Summary screen**

## To delete a claim

If the Contracting Entry has entered a claim in error and the claim has **not** been included in the batch payment process (i.e., the status of the claim is NOT "Accepted*" or "Processed"), the claim can be deleted.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays
4. Select **Delete** in the Edit menu in the upper-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.

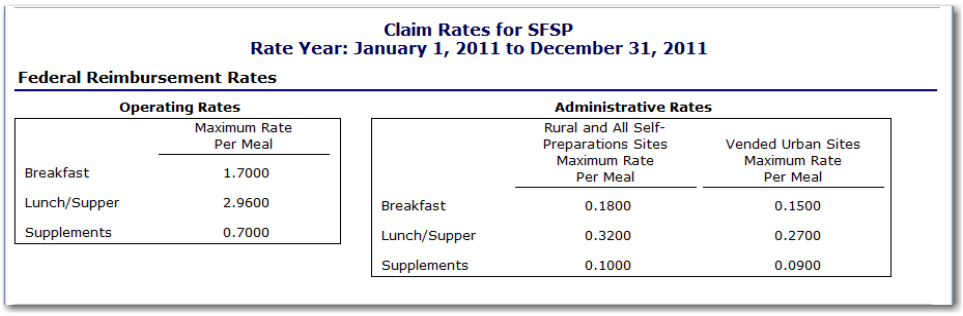
**WARNING**: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

## Claim Rates

The system provides a screen to view claim for reimbursement rates by year. The rates displayed apply for the rate year defined at the top of the page. Meals are reimbursed based on the designated rate established by the USDA. Annually, the reimbursement rates are entered by authorized TDA staff through the Claim Rate Maintenance screens in the Maintenance and Configuration module.

## To access Claim Rates

1. From the Claims menu, select **Claim Rates**. The Claim Rates screen displays.
2. Use the **<Back** button to return to the Claims menu.



**Claim Rates for SFSP**
**Rate Year: January 1, 2011 to December 31, 2011**

**Federal Reimbursement Rates**

**Operating Rates**

| | Maximum Rate Per Meal |
|---|---|
| Breakfast | 1.7000 |
| Lunch/Supper | 2.9600 |
| Supplements | 0.7000 |

**Administrative Rates**

| | Rural and All Self-Preparations Sites Maximum Rate Per Meal | Vended Urban Sites Maximum Rate Per Meal |
|---|---|---|
| Breakfast | 0.1800 | 0.1500 |
| Lunch/Supper | 0.3200 | 0.2700 |
| Supplements | 0.1000 | 0.0900 |

**Figure 38: Claim Rates for SFSP screen**

**TIP:** The Claim Rates screen defaults to the designated program year identified at the top right of the screen. To view the claim rates for a previous year, see Selecting a Program Year.

# Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Contracting Entity for the selected school year. Each schedule number and process date represents payments that have been scheduled. Payments from payment batches are grouped by program and sorted by date.

## To access Payment Summary

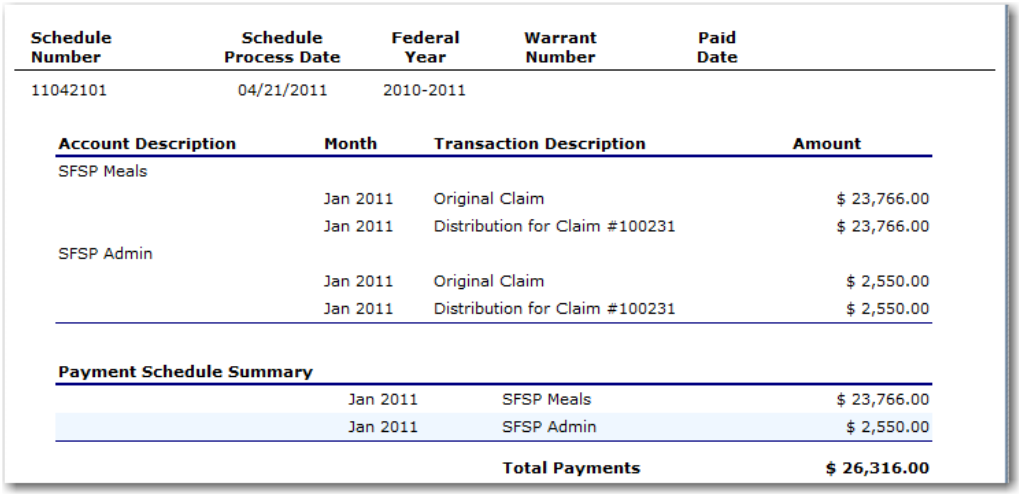
1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.
2. Use the **<Back** button to return to the Claims menu.

| Schedule Number | Processed Date | Warrant Issue Date | Earned Amount | Adjustments | Distribution Amount |
|---|---|---|---|---|---|
| 11042101 | 04/21/2011 | | $ 26,316.00 | $ 0.00 | $ 26,316.00 |

**Figure 39: Payment Summary List screen**

## To view a Payment Summary

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.
2. Select the payment record you wish to view. The payment summary information displays for all payments included in the payment batch.
3. Select the **<Back** button to return to the previous screen.



| Schedule Number | Schedule Process Date | Federal Year | Warrant Number | Paid Date |
|---|---|---|---|---|
| 11042101 | 04/21/2011 | 2010-2011 | | |

| Account Description | Month | Transaction Description | Amount |
|---|---|---|---|
| SFSP Meals | | | |
| | Jan 2011 | Original Claim | $ 23,766.00 |
| | Jan 2011 | Distribution for Claim #100231 | $ 23,766.00 |
| SFSP Admin | | | |
| | Jan 2011 | Original Claim | $ 2,550.00 |
| | Jan 2011 | Distribution for Claim #100231 | $ 2,550.00 |

**Payment Schedule Summary**

| | | |
|---|---|---|
| Jan 2011 | SFSP Meals | $ 23,766.00 |
| Jan 2011 | SFSP Admin | $ 2,550.00 |
| | **Total Payments** | **$ 26,316.00** |

**Figure 40: Payment Summary screen**

# 6

# Security

*System-authenticated users (i.e., users that are logged on) may change their password through the Change Password feature.*

## Security menu

The Security menu option within the Summer Food Service Program module is the access point to the Change Password and User Manager functions.

### To access the Security menu

1. Select **Security** on the blue menu bar at the top of the page.
   The Security menu displays.
2. Select a security item to access that security function.

### To access Change Password

1. On the blue menu bar, select **Security**.
2. On the Security menu, select **Change Password.** The Change Password screen displays.
3. Enter your **New Password**.
4. Re-Enter your New Password.
5. Select **Save**. A confirmation message displays.
6. Select **<Edit** to return to the Change Password screen you just modified.
   -OR-
   Select **Finish** to return to the Security menu.

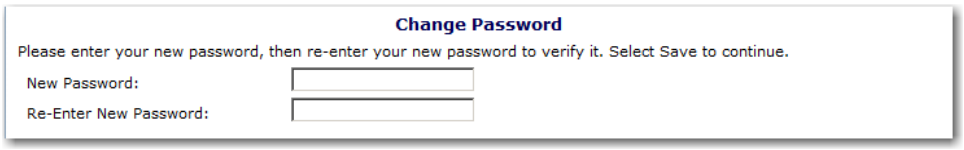

Change Password
Please enter your new password, then re-enter your new password to verify it. Select Save to continue.
New Password:
Re-Enter New Password:

**Figure 41: Change Password screen**

**Note:** Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10)

characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

7

# Application Packet Process

*This section of the manual provides information on how the State can review and approve SFSP Application Packets through TX-UNPS.*

**Note:** For security purposes, users can only view Contracting Entities to whom they are associated.

## Submitting an SFSP Application Packet

All new enrollment or renewal enrollment applications are initially created with a status of "Pending Validation". Once the Application has been saved, the systems validates the business rules and the application's status is set by the system to either "Error" (if any errors exist) or "Not Submitted" (no errors, but the Application Packet has not been submitted).

Only complete Application Packets that have no errors can be submitted to the State. To submit a completed Application Packet, the Contracting Entity would select the **Submit for Approval** button. This simulates sending a completed Application Packet in the mail. Application items are placed in a view-only mode for the Contracting Entity.

An Application Packet can be submitted to the State (i.e., the **Submit for Approval** button is enabled) only if the following conditions have been met:

- The Contracting Entity Application must contain no errors.
- At least one Site Application must exist and contain no errors.
- A Management Plan must exist and contain no errors.
- A Budget must exist and contain no errors if the Contracting Entities that:
    - had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application)

    OR

    - is identified as a Type of Agency of "Private Non Profit Organization" (i.e., on their CE Profile).

- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Contracting Entity is not closed.

Once the Contracting Entity has submitted the Application Packet, the State will review each item in the submitted Application Packet. The State may approve each application item, deny an application item, or return the application item and its respective Application Packet back to the Contracting Entity for correction.

If the Application Packet is denied or returned to the Contracting Entity for correction, the State will provide comments within the respective Application Packet item as to why the application was denied or what needs to be corrected in order to re-submit the Application Packet.

# SFSP Application Packet Checklist Items

### Contracting Entity Application

1. The following checklist items are required for ALL New SFSP Contracting Entity applications:
    - Permanent Agreement
    - Civil Rights Form
    - Texas Identification Number (TIN) Form
    - Direct Deposit Form
    - Health Department Letter with Confirmation
    - Copy of Media Release
2. The following checklist items are required for ALL Renewal SFSP Contracting Entity applications:
    - Health Department Letter with Confirmation
    - Copy of Media Release
3. The following checklist items are required for a New SFSP Contracting Entity applications however, the Contracting Entity does operate in another program:
    - Permanent Agreement Amendment
4. The following checklist items are required for a New SFSP Contracting Entity

applications whereby the Contracting Entity's meals are "Self-Prep" or vended by another School Food Authority and wish to receive USDA Foods:

- FND Commodity Agreement

5. The following checklist items are required for a New SFSP Contracting Entity applications and the Contracting Entity is a Private Non Profit Organization:

   - VCA Checklist

## Site Application

1. The following checklist item is required for ALL sites with an eligibility method of "Bureau of Indian Affairs Letter":
   - Copy of Bureau of Indian Affairs Letter
2. The following checklist item is required for ALL sites with an eligibility method of "Migrant Organization Letter":
   - Copy of Migrant Organization Letter
3. The following checklist item is required for ALL Camps that have a separate charge for meals served to non-eligible children:
   - Method for Collecting Payment and Additional Assurances
4. The following checklist item is required for ALL sites whose meal service method is "Self-Prep – Prepares on site":
   - Health Department Permit or Proof No Permit Required
5. The following checklist item is required for ALL sites whose meal service method is "Vended by FSMC":
   - Copy of Vending Agreement, Contract, Bid Summary, IFB, RFP or Contract Extension
6. The following checklist item is required for ALL sites whose meal service method is "Vended by FSA":
   - Copy of Agreement to Provide Food Service
7. The following checklist item is required for ALL sites whose meal service method is "Vended by another SFSP Contracting Entity":
   - Copy of Agreement to Provide Food Service

# Application Packet Statuses

Statuses are used to manage the workflow of the Application Packet. Each packet can have only one status at a time.

- Not Submitted
  - The packet has a status of "Not Submitted" when the packet is created for the first time or when any of the packet items are created, revised, or modified, but the Application Packet has not been submitted to the State.
- Submitted
  - The packet has a status of "Submitted" when the Contracting Entity uses the **Submit for Approval** button on the Application Packet screen to submit the error-free packet to the State for review.
  - If the packet status is "Submitted", the entire packet becomes read-only to the Contracting Entity.
  - All applications that are "Submitted" must ultimately be "Approved", "Denied", or "Returned for Correction" or "Withdrawn".
- Approval Recommended (i.e., First Level Approved)
  - When a Contracting Entity is new to the program, the system will require two levels of approval. This status represents the first level of approval performed by the State before a final approval is granted.
  - The Application Packet screen will display the **First Approval** button when the first level approval is required. After the button has been selected, this button will not display; however, the **Approve** button will be displayed.
- Approved
  - The packet has a status of "Approved" when the State has approved each packet item AND has selected the **Approve** button on the Application Packet screen.
- Denied
  - The packet has a status of "Denied" when the State selects the **Deny** button on the Application Packet screen.
  - When a packet is "Denied", the packet remains view-only and nothing in the packet can be modified. The only way to edit items in a denied packet is for the State to change the status of the packet to something other than "Denied".
  - By denying an Application Packet, the status of all items within the packet is automatically set to "Denied".
  - An "Approved" packet cannot be "Denied".
- Returned for Corrections
  - The packet has a status of "Returned for Corrections" when the State selects the **Return** button on the Application Packet screen.

- This status unlocks the packet for the Contracting Entity and sets the status back to "Not Submitted".
- An "Approved" packet cannot be "Returned for Corrections".

- Withdrawn
  - The packet has a status of "Withdrawn" when the Contracting Entity or State selects the **Withdraw** button on the Application Packet screen.
  - An Application Packet with a status of "First Level Approved" can be withdrawn.
  - An Application Packet with a status of "Approved" packet cannot be "Withdrawn". If an application has been "Approved", it can only be "Cancelled" or "Terminated" by the State (see ***Application Packet*** section).

# Application Statuses

Statuses are used to define the current state of an application packet item. Each application can have only one status at a time.

- Pending Validation
  - The application has a status of "Pending Validation" when the application has not yet been opened or saved.
- Error
  - The application has a status of "Error" if it has failed system validation rules. Data entered is maintained.
- Not Submitted
  - The application has a status of "Not Submitted" when the application is saved without error, but the Application Packet has not been submitted to the State.
- Submitted
  - The application has a status of "Submitted" when the Contracting Entity has submitted the Application Packet to the State for review (i.e., the Contracting Entity has selected the **Submit for Approval** button).
  - Any application that is marked "Not Submitted" is changed to "Submitted"
  - The Application Packet becomes read-only to Contracting Entity users.
- Approved
  - The application has a status of "Approved" when the State has approved the application (i.e., the State selected "Approved" in the Internal Use Only section of the form).
- Denied
  - The application has a status of "Denied" when the State has denied the application (i.e., the State selected "Denied" in the Internal Use Only section of the form).
  - If the application is "Denied", it can no longer be modified by the Contracting Entity. Only the State can change the status of the application.
  - When setting the application status to "Denied", the State should enter a comment in the Comments to Contracting Entity field explaining the reason the application was denied.
- Returned for Correction
  - The application has a status of "Returned for Correction" when the State has identified errors in the application and has selected "Returned for Correction" in the Internal Use Only section of the form.
  - When setting the application status to "Returned for Correction", the State should enter a comment in the Comments to Contracting Entity field explaining the reason the application was returned.

- Withdrawn
    - The application has a status of “Withdrawn” when the State has selected “Withdrawn” in the Internal Use Only section of the form.
    - If the Application Packet has ever been approved, there will not be an option to withdraw.

# Claim Statuses

Statuses are used to define the current state of a claim. Each claim can have only one status at a time.

- Not Eligible
  - The claim has a status of "Not Eligible" when there is an application condition that is preventing claiming for the selected month (e.g., Contracting Entity or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not "Approved").
- Incomplete
  - The claim has a status of "Incomplete" when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.
- Error
  - The claim has a status of "Error" when the claim has been submitted and has business rule violations.
- Pending
  - The claim has a status of "Pending" when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 60 days edit, etc.).
  - Applicable only when the Contracting Entity is participating in CE-level claiming.
- Validated
  - This site claim has a status of "Validated" when the site claim has been entered, validated, and contains no errors.
  - Applicable only when the Contracting Entity is participating in site-level claiming.
- Accepted
  - The claim has a status of "Accepted" when the claim has passed all on-line edits and additional edits (e.g., 60 days edit, etc.), and is ready to be included in the payment tracking process.
  - The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.
- Accepted*
  - The claim has a status of "Accepted*" when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
  - The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.
- Processed
  - Claim has been fully processed by TDA and has been sent to the State's Accounting Office for disbursement of funds.